MRAA vBDC Enrollment Form

CLIENT: The Client agrees to provide CSI with the customer list electronically, set up a user ID for CSI to weekly pull the lists, or enter their customer list directly into the CSI database via CSI's client portal. For any format that would require CSI to enter the names manually into our database, the fee will be $.50 cents per customer name submitted. ***CSI warrants the confidentiality of such lists and they will remain the property of the Client and used for no other purpose.***

SETUP FEES & SERVICES: For a ONE-TIME Setup Fee (per program) of $300.00 USD, CUSTOMER SERVICE INTELLIGENCE, Inc. (CSI) will provide our call center, and a custom in-house team of CSI Professional Customer Service Representatives, along with a service in which important customer feedback is collected by direct telephone contact, email and text messages with the Client's customers. This feedback is then transmitted to the Client in various Management Reports: (listed below) for the primary purpose of helping the Client achieve higher levels of customer satisfaction, repeat business, referrals and/or closing ratios within the Client's organization. CSI will charge $14.00 per customer name submitted for a two-part one question survey. If client elects to have the HOT TRANSFER option, there will be an additional charge of $10 per HOT TRANSFER. Additional questions available @ $1.50 each. CSI will make up to 3 attempts and leave two voicemails, unless otherwise noted or directed. Non-contacts will be detailed and categorized on client's Monthly Call Summary Report.

MANAGEMENT REPORTS

CUSTOMER REPORT CARD All Customer comments, complaints, urgent requests will be flagged as "HOTSHEET." Employee Praises will be flagged as WOW!

HOTSHEET STATUS REPORT List of recent customers that were flagged as "HOTSHEET"

WOW REPORT List of recent customers' comments that were flagged as "WOW"

EMPLOYEE PERFORMANCE REPORT Track your Salespeople's performance with this incredible tool

SUGGESTION SUMMARY Summary and pie chart of suggestions categorized into 12 areas for easy reference

CALL SUMMARY REPORT Reasons for Customers unavailability

Also Included:

- Live Customer Service and a CSI Client Liaison
- Staff-wide access to CSI's proprietary cloud software application
- Customizable Reports upon request
- Daily (HOT/WOW) & Weekly/Monthly Email Report Delivery

OTHER TERMS:

Renewal: The Client agrees to an initial agreement period of ninety (90) days, beginning on _____. After such time, this agreement will automatically renew every thirty (30) days. CSI asks 30 days written notice to cancel this agreement.

Billing: CSI Invoices are billed monthly, after the Management Report is generated. Terms are NET/10. If payment is not received by the 11th past due day, the client's corporate credit card will be charged for the amount due.

Past due charges: A late fee of $25/month/program will be charged on the 31st past due day for all invoices. When a current Corporate Credit Card is not on file, these late fees will be added to your next month's invoice(s). Should account become 30 days past due; service will be paused. Service will resume after account is brought current.

Consent Clause: By providing CSI with your customer phone numbers and contact info, you consent to have CSI contact your customers via the means of service that you have chosen for CSI to use for said contact (phone call, SMS, email, etc.)

CUSTOMER SERVICE INTELLIGENCE

North American Enrollment Form

Client Name: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Phone: _____ **Email:** _____

Contact Person: _____ **Credit Card:** _____ **Exp.:** _____

Association Membership: _____ **Company Management Software:** _____

Estimated Monthly Volume: _____

Client Agrees to the above fees and terms:

	Becky Thompson
Client Signature	CSI Signature
	Becky Thompson
Print Name	Print Name
	President
Title/Role	Title/Role

CUSTOMER SERVICE INTELLIGENCE

North American Enrollment Form

COST SUMMARY

PROGRAM	UNIT PRICE	SETUP FEE	ADDITIONAL

ADDENDUMS